

New User Registration

These instructions will assist you in registering as a CalATERS user. Instructions for obtaining your User ID and password, signing in to CalATERS, and getting additional instructions from the CalATERS web site are also included.

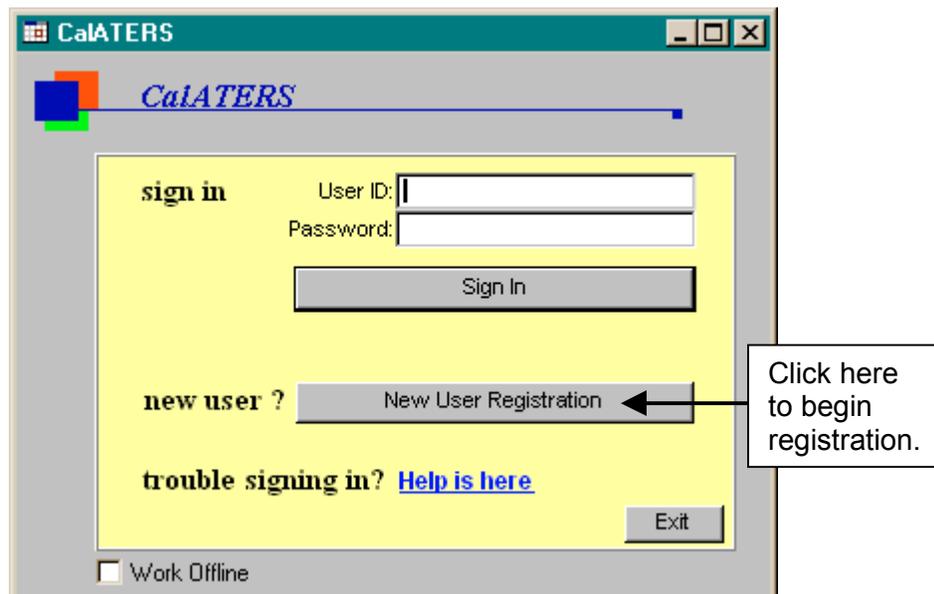
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I. Begin New User Registration

Click the  button from the CalATERS web site.



The following screen will appear. Click the  button.

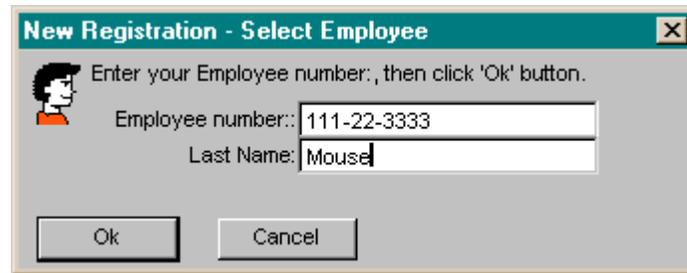


I. Begin New User Registration (continued)

Enter your **Employee Number** e.g., social security number, and your **Last Name**.

Click the  button.

Note: Your social security number is used for validation during new user registration only. Your social security number is secure and will not be displayed on any screens within the CalATERS for you or others to see.



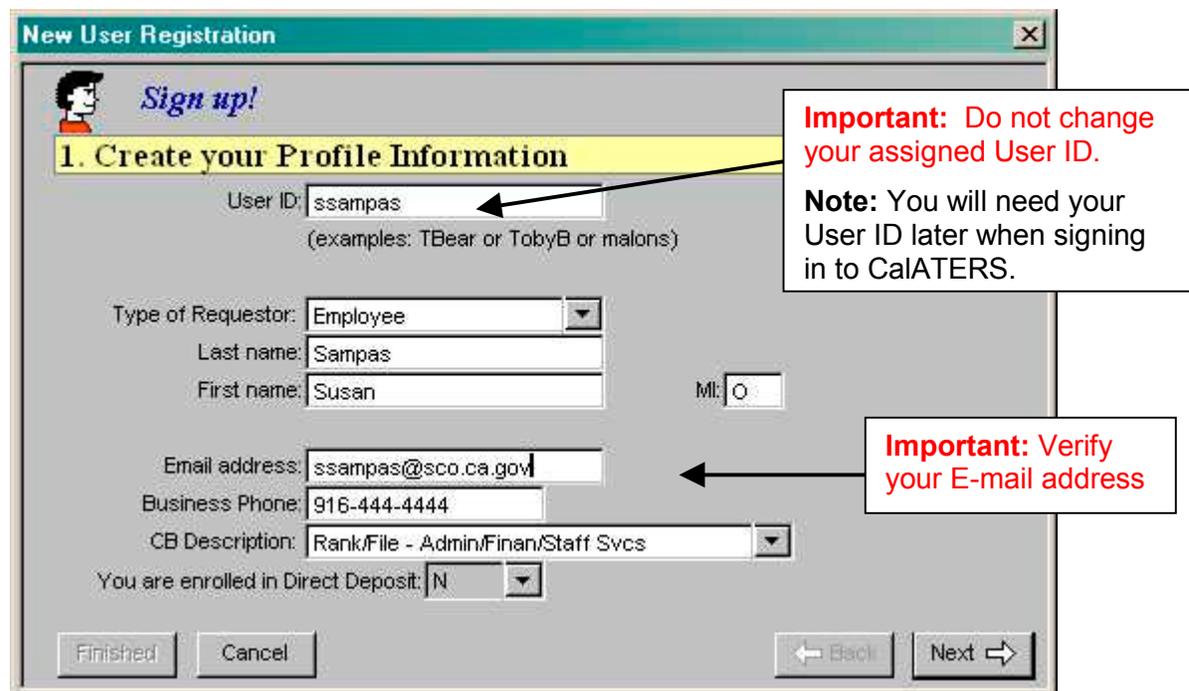
A dialog box titled "New Registration - Select Employee" with a close button (X) in the top right corner. It contains a small cartoon character icon and the text "Enter your Employee number:, then click 'Ok' button." Below this, there are two input fields: "Employee number:" with the value "111-22-3333" and "Last Name:" with the value "Mouse". At the bottom, there are two buttons: "Ok" and "Cancel".

II. Create Your Profile Information

The first screen of your Profile appears. When a field contains information, your department or the CalATERS system has completed the field for you. You can move from one field to another by tabbing or placing your cursor in a field and clicking the left mouse button.

For detailed information on Profile fields (e.g., User ID, Type of Requestor, CB Description) refer to **Definitions** on the CalATERS web site.

When all fields on this screen are completed, click the  button.



A screenshot of the "New User Registration" application window. The title bar says "New User Registration" with a close button (X). The main area has a "Sign up!" icon and the heading "1. Create your Profile Information". The form contains the following fields:

- User ID: ssampas (with examples: TBear or TobyB or malons)
- Type of Requestor: Employee (dropdown menu)
- Last name: Sampas
- First name: Susan
- MI: O
- Email address: ssampas@sco.ca.gov
- Business Phone: 916-444-4444
- CB Description: Rank/File - Admin/Finan/Staff Svcs (dropdown menu)
- You are enrolled in Direct Deposit: N (dropdown menu)

At the bottom, there are buttons for "Finished", "Cancel", "Back", and "Next". Two callout boxes provide important information:

- One box points to the User ID field with the text: "Important: Do not change your assigned User ID. Note: You will need your User ID later when signing in to CalATERS."
- Another box points to the Email address field with the text: "Important: Verify your E-mail address"

III. Mailing and Residence Address

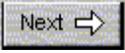
Key your mailing address. It is important that the mailing address is correct, because this is the address that is used to mail reimbursement checks if you are not on direct deposit.

Answer the question, "Is your residence address same as mailing address?" If you answered **Yes**, click the  button and go to the next page. If you answered **No**, continue on this page.



The screenshot shows a "New User Registration" window with a "Sign up!" icon. Under the "Mailing Address:" section, the following fields are filled: Street: 500 Main Street, City: Roseville, State: CA, and Zipcode: 95661-. Below these fields is a question: "Is your residence address same as mailing address?" with a dropdown menu set to "Yes". At the bottom of the window are buttons for "Finished", "Cancel", "Back", and "Next".

If you answered **No**, your residence address is different from your mailing address, answer the question "My residence address is on file with the Accounting Office".

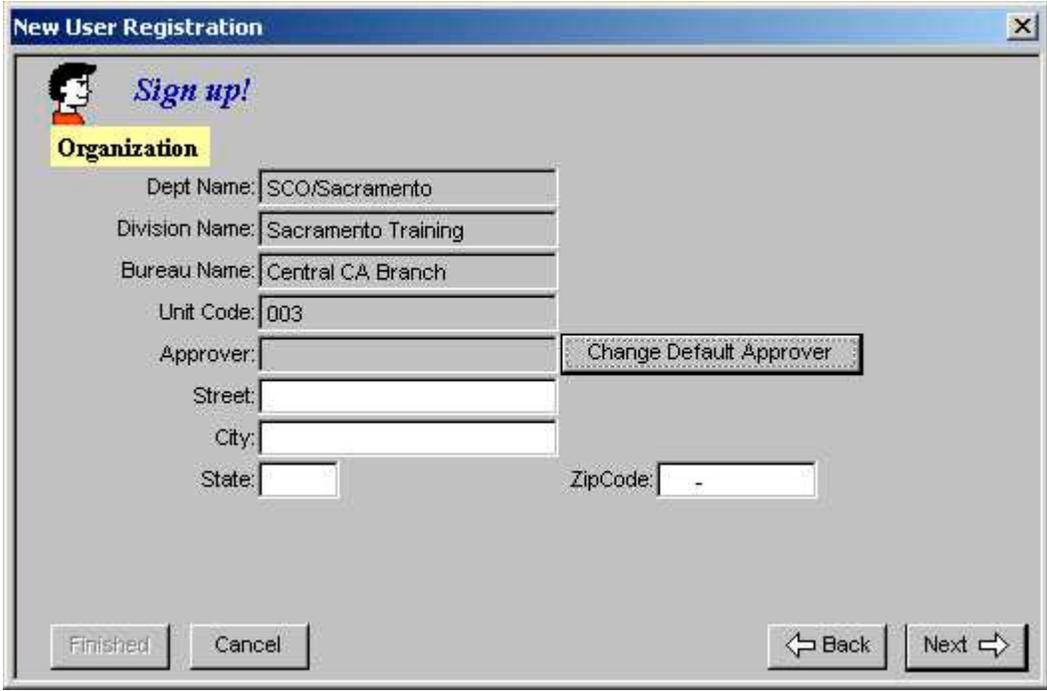
If you answered **Yes**, click the  button. If you answered **No**, complete the address fields then click the  button.



The screenshot shows the "New User Registration" window with two sections. The "Mailing Address:" section has Street: 500 Main Street, City: Los Angeles, State: CA, and Zipcode: 99991-. Below it is the question "Is your residence address same as mailing address?" with a dropdown menu set to "No". The "Residence Address:" section has a question "My residence address is on file with the Accounting Office" with a dropdown menu set to "No". Below this are fields for Street: 100 Fantasy Place, City: Buena Vista, State: CA, and Zipcode: 99999-. At the bottom are buttons for "Finished", "Cancel", "Back", and "Next".

IV. Organization

The **Organization** screen is used to designate your **Default Approver** (person designated as the first level approver for Travel Advances and Expense Reimbursements) and work address.

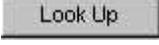


The screenshot shows a window titled "New User Registration" with a "Sign up!" icon. The "Organization" section contains the following fields and buttons:

- Dept Name: SCO/Sacramento
- Division Name: Sacramento Training
- Bureau Name: Central CA Branch
- Unit Code: 003
- Approver: (empty field) with a "Change Default Approver" button to its right.
- Street: (empty field)
- City: (empty field)
- State: (empty field)
- ZipCode: - (empty field)

At the bottom, there are "Finished", "Cancel", "Back", and "Next" buttons.

Click the  button.

Key in the last name of your Approver in the **Last Name** field and click the  button.



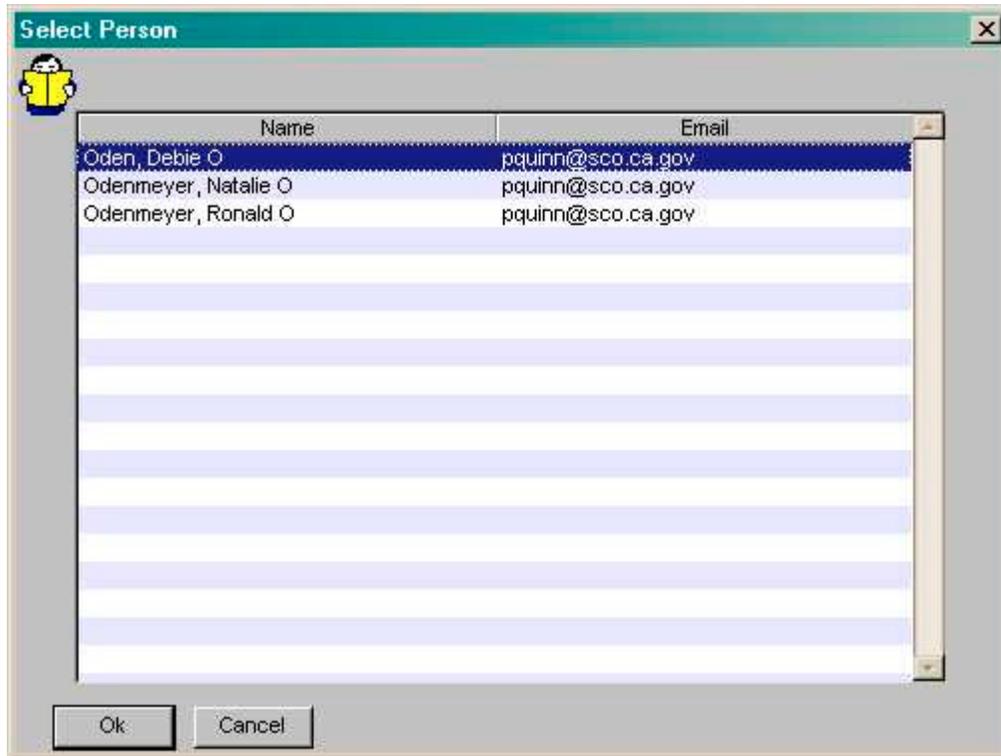
The screenshot shows a dialog box titled "Select Person" with the following content:

- Enter last name or first few letters, then click 'Look Up' button.
- Last name: oden (text entered in the field)
- Look Up button
- OK button
- Cancel button

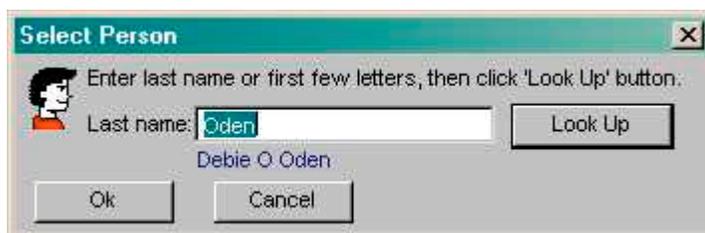
Note: If an approver has not performed new user registration, they will not be available for Look Up. If your approver is not registered, the approver field can be left blank, but the field should be updated on your Profile after the approver performs new user registration, or before a Travel Advance or Expense Reimbursement form is submitted.

IV. Organization (continued)

Select a name from the list and click the  button.



Confirm your selection and click the  button. The **Approver** field should now display the Approver's name.



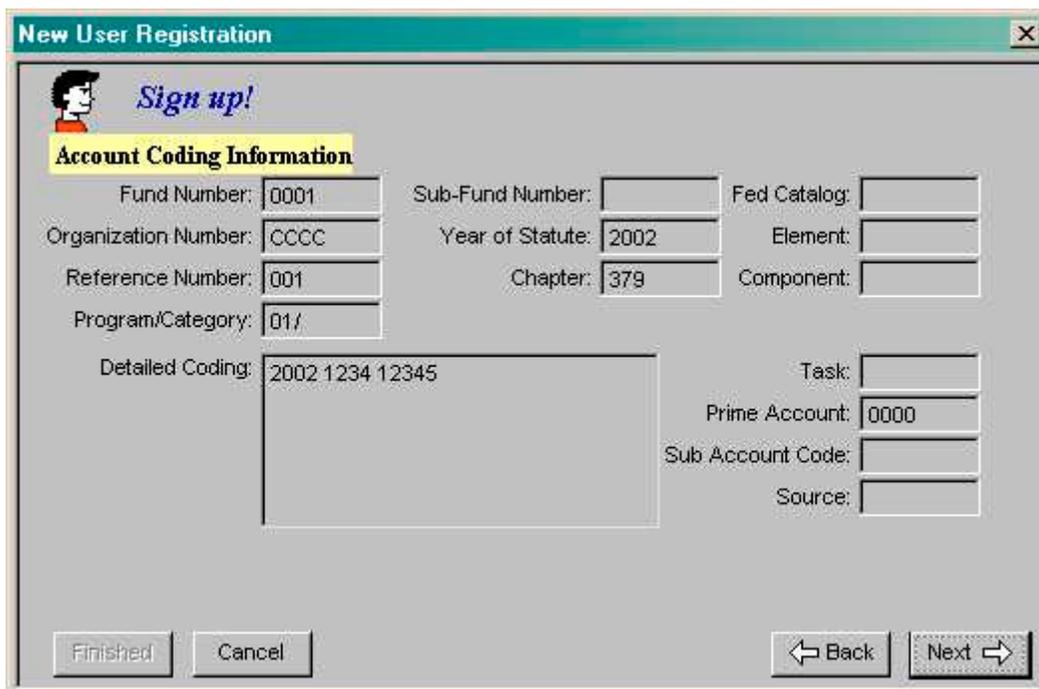
When all applicable fields on the **Organization screen** are completed, click the  button.

V. Account Coding Information

You will not be able to modify any information on the **Account Coding Information** screen. This information is updated and maintained by your department and is used to determine the default-funding source for your Expense Reimbursements.

Note: Your department will modify some fields on a fiscal year basis. Some fields may be blank.

Click the  button for the next screen in your Profile.



The screenshot shows a window titled "New User Registration" with a "Sign up!" icon. The "Account Coding Information" section contains the following fields:

Fund Number:	0001	Sub-Fund Number:		Fed Catalog:	
Organization Number:	CCCC	Year of Statute:	2002	Element:	
Reference Number:	001	Chapter:	379	Component:	
Program/Category:	01/				
Detailed Coding:	2002 1234 12345			Task:	
				Prime Account:	0000
				Sub Account Code:	
				Source:	

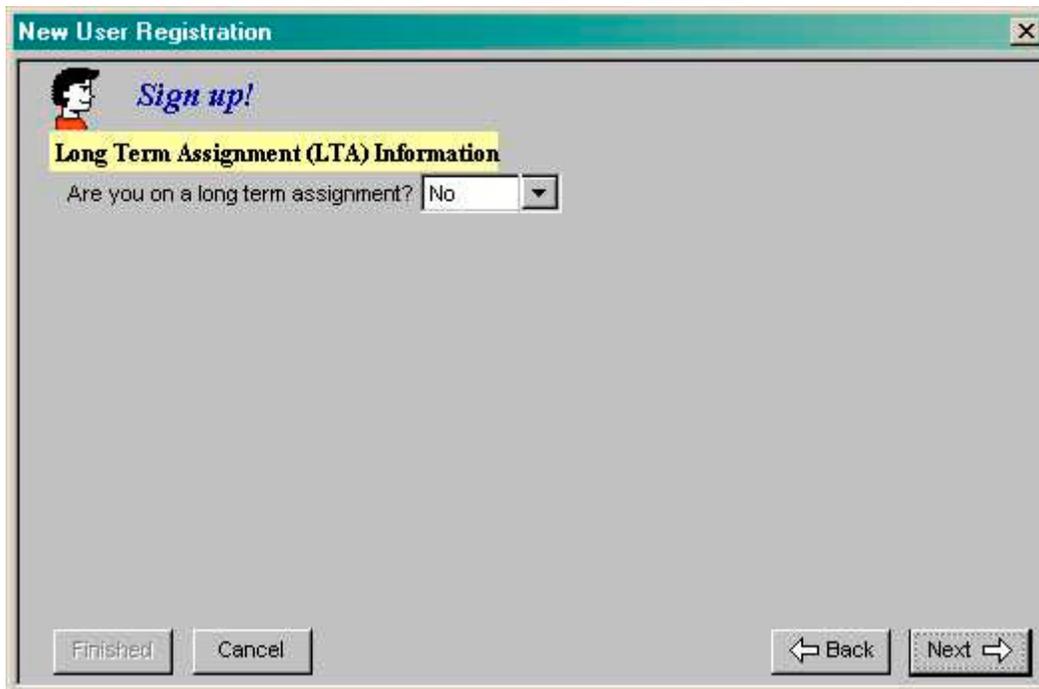
At the bottom, there are buttons for "Finished", "Cancel", "Back", and "Next".

VI. Long Term Assignment (LTA)

A long-term assignment is a pre-approved business trip of more than 30 consecutive days.

If you are on a long-term assignment, click the down arrow  and select **Yes**. Go to the next page for information on completing additional LTA fields.

If you are not on a long-term assignment, click the  button, then go to the next section **VII. Complete New User Registration.**



New User Registration

Sign up!

Long Term Assignment (LTA) Information

Are you on a long term assignment? No 

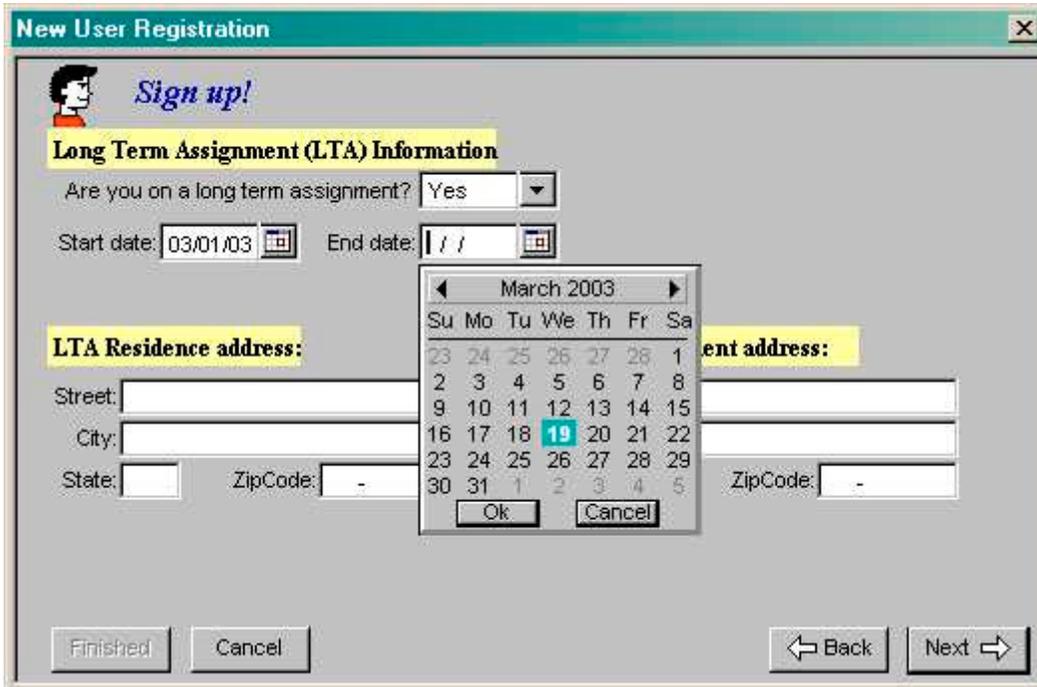
Finished Cancel  

VI. Long Term Assignment (LTA) (continued)

If you answered **Yes**, you are on a long-term assignment, complete the remaining LTA fields.

To select a **Start Date** and **End Date**, key dates into the fields or click on the calendar button  next to the fields. When the calendar appears, clicking on the arrows ◀ ▶ next to the calendar month, will display the month before (◀) or the month after (▶).

When all applicable fields are completed, go to section **VII. Complete New User Registration.**



New User Registration [X]

 *Sign up!*

Long Term Assignment (LTA) Information

Are you on a long term assignment? Yes ▼

Start date: 03/01/03  End date: / / 

LTA Residence address:

Street:

City:

State: ZipCode: -

Work address:

Street:

ZipCode: -

March 2003

Su	Mo	Tu	We	Th	Fr	Sa
23	24	25	26	27	28	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Ok Cancel

Finished Cancel Back Next

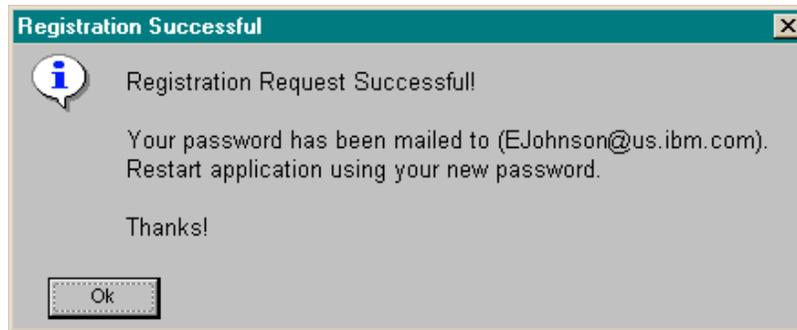
VII. Complete New User Registration

Click the **Finished** button on the **Miscellaneous Profile** screen to complete New User Registration.

The screenshot shows a window titled "New User Registration" with a close button in the top right corner. Inside the window, there is a cartoon character icon and the text "Sign up!". Below this is a section titled "Miscellaneous Profile:" with three input fields: "PPSD Agency Code:" containing "900", "Reporting Unit:" containing "100", and "State Code:" containing "CA". At the bottom left, there are two buttons: "Finished" and "Cancel". At the bottom right, there are two buttons: "Back" with a left-pointing arrow and "Next" with a right-pointing arrow. A callout box with the text "Click to complete registration." has an arrow pointing to the "Finished" button.

VII. Complete New User Registration (continued)

Once New User Registration is complete, the following message will appear stating that your password will be mailed to your e-mail address. Verify that this is the correct e-mail address then click the  button.

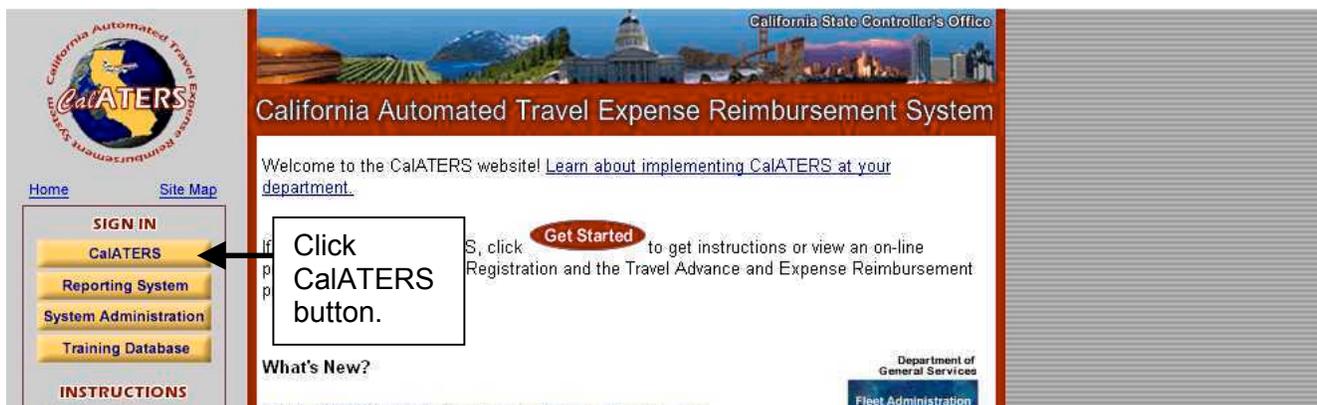


You have completed New User Registration. Go to your e-mail system to obtain the note with your CalATERS password. If you do not receive an e-mail note with your password, the e-mail address in your Profile may be incorrect. Contact your department's CalATERS Help Desk for assistance.

VIII. Sign In to CalATERS

Once New User Registration is completed, return to the CalATERS web site to sign in to CalATERS.

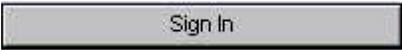
Click the  button from the CalATERS web site.

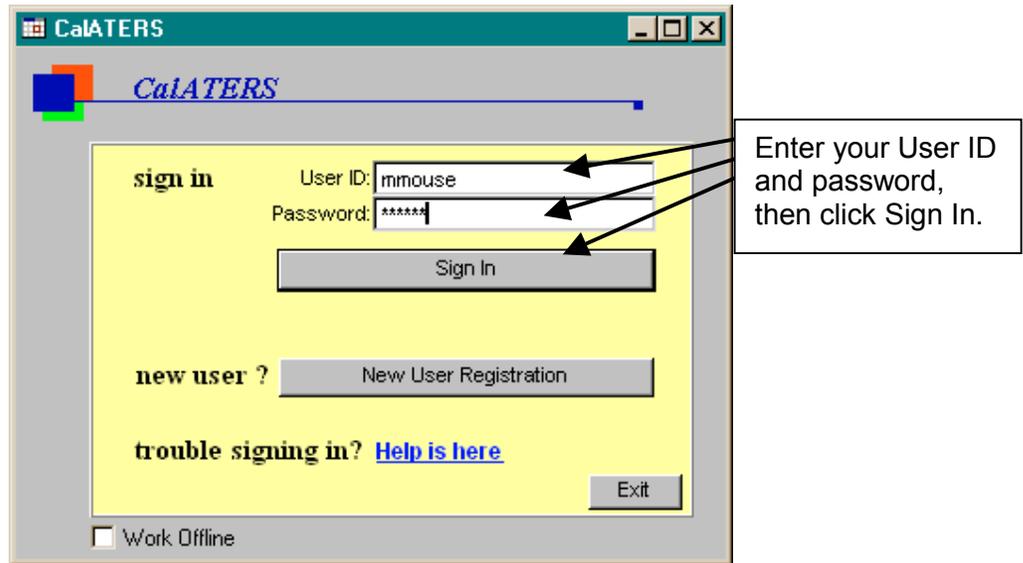


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VIII. Sign In to CalATERS (continued)

The Sign-in screen appears. Key your User ID and Password into the appropriate fields.

Click the  button.



Problems Signing In

If you have problems signing in, contact your department's CalATERS Help Desk, or refer to instructions for Forgot Your User ID or Password? on the CalATERS web site.

Additional Instructions

For additional instructions on using CalATERS refer to Travel Advance & Expense Reimbursement on the CalATERS web site.